HealthShare Referral Manager
Quick Reference Guide for Clinical Viewer

HEALTHSHARE REFERRAL MANAGER (HSRM) is an electronic referral and authorization processing system used by the Department of Veterans Affairs (VA) to accelerate Veterans' access to community care. HSRM allows VA, third-party administrators (TPAs), and community providers to better manage community care referrals and authorizations. HSRM facilitates a reduction in turnaround time for processing referrals, providing care, submitting claims, and receiving payment. This quick reference guide is one of several guides that will help users get the most out of HSRM.

QUICK REFERENCE GUIDE TOPICS
1. Clinical Viewer and HSRM
2. Locate a referral
3. Using Clinical Viewer
4. Help with HSRM

1. CLINICAL VIEWER AND HSRM

The Clinical Viewer portal offers users a comprehensive view of a Veteran's medical documentation history in HSRM. Categories of information available in Clinical Viewer include a clinical summary of the patient's history, allergies, immunizations, medications, lab results, procedures, and more. HSRM uses Veterans Data Integration and Federation Enterprise Platform (VDIF-EP) to gather and consolidate patient history information. The information is filtered into relevant categories in Clinical Viewer. This gives HSRM users a secure, centralized source of medical history and patient details for a Veteran in HSRM.

2. LOCATE A REFERRAL

HSRM allows users to locate referrals quickly and manage them according to their priority. When logging in to HSRM, the Referral List screen—which is also the home screen—appears. Users can treat the Referral List screen as a to-do list, as it shows all of the referrals from VA in a central location. Users can locate a specific referral using the Referral List.

The Referral List contains a sorting feature that allows users to quickly organize referrals based on a variety of criteria.

To locate a referral using the Referral List:

1. Select the **Menu** icon ≡ at the top left of the screen.
2. Select **Referral List** from the drop-down menu to navigate to the **Referral List** screen.
3. Locate the referral by sorting the list (e.g., Last Name, First Name).
4. Select the row of the referral to view the referral details.

3. USING CLINICAL VIEWER

Clinical Viewer is accessible from the Referral Details screen for any Veteran that has relevant data in the system. The Clinical Viewer icon 🔲 will be available on the Patient Banner to access patient data.
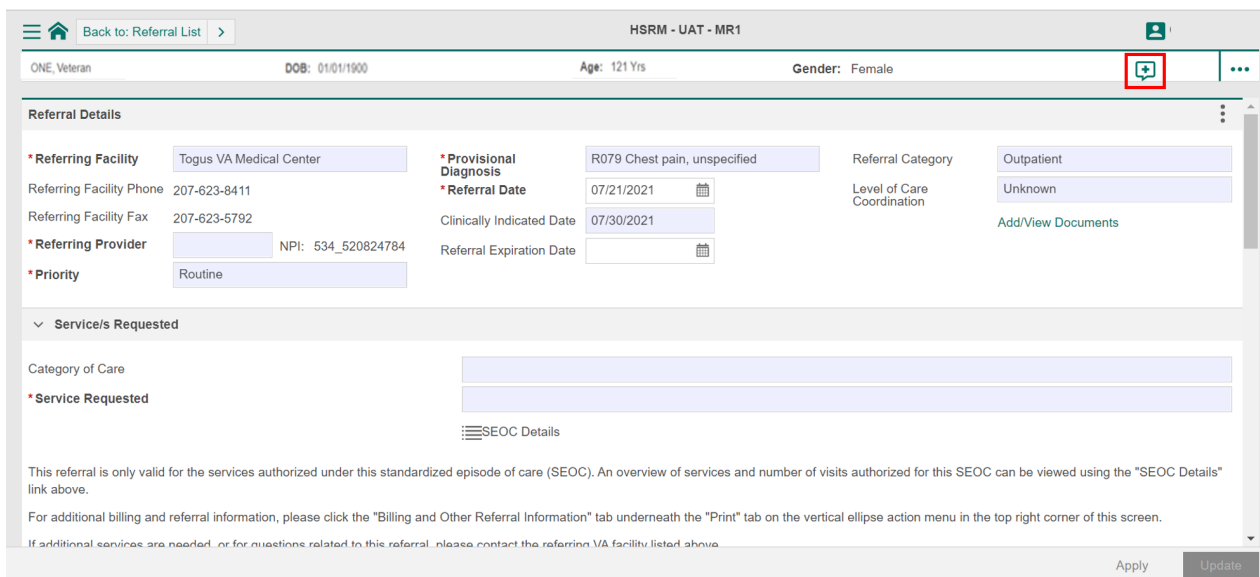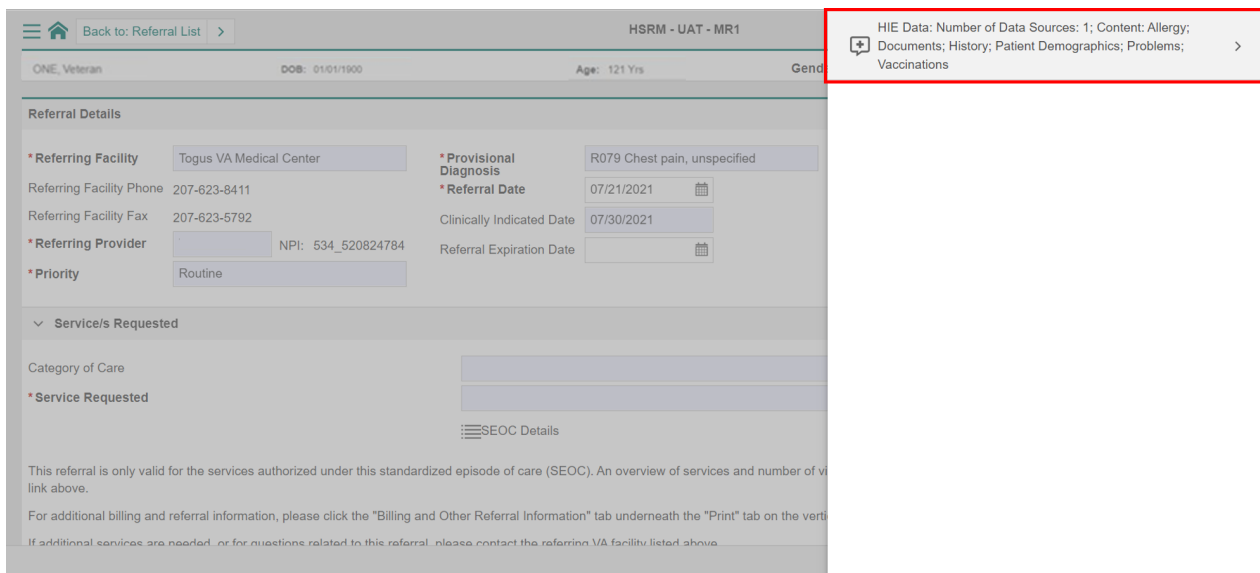
To access Clinical Viewer:

1. Locate the Veteran's referral (see the Locate a Referral section of this guide).
2. Select the **Clinical Viewer** icon 🔲 on the Patient Banner of the **Referral Details** screen, as shown in **Exhibit 1.**

U.S. Department of Veterans Affairs
Veterans Health Administration
Office of Community Care
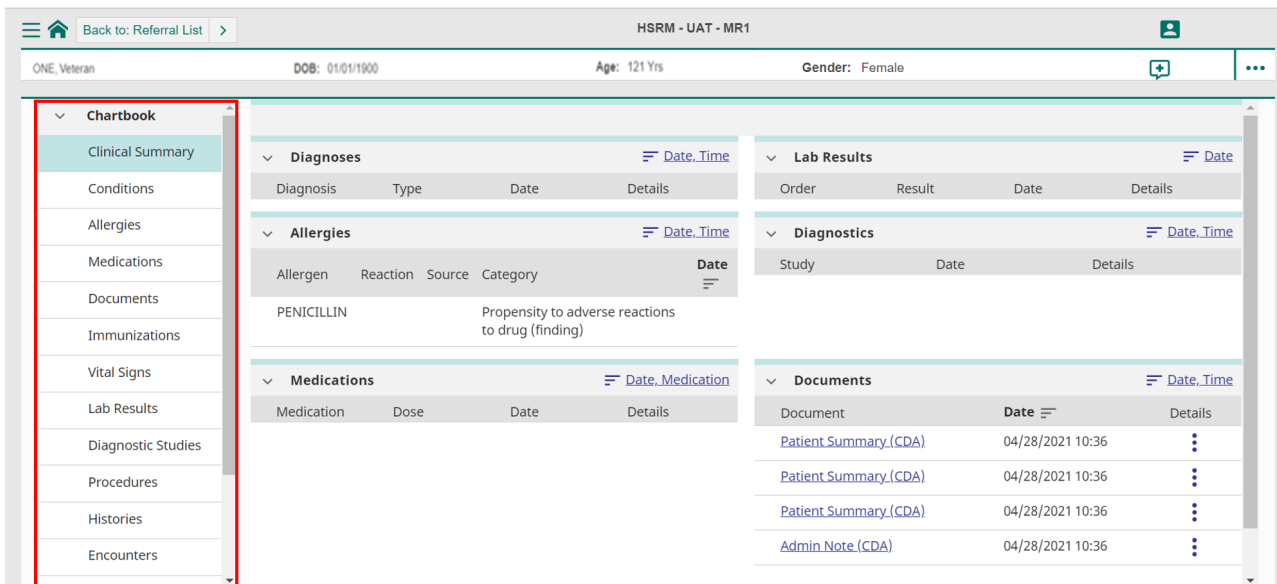
Exhibit 1: Referral Details Screen

3.   A menu will open. Select the option beginning with **HIE (Health Information Exchange) DATA**, as shown in **Exhibit 2.**

Exhibit 2: Clinical Viewer Access Menu

4.   The Clinical Viewer page will open, displaying the patient's medical history in HSRM. The categories of information available for viewing are displayed in the **Chartbook,** as shown in **Exhibit 3**. Select one of the categories in the Chartbook to view it.

U.S. Department of Veterans Affairs
Veterans Health Administration
Office of Community Care

Exhibit 3: Clinical Viewer Home Screen

Any category in the Chartbook with available data can be viewed by selecting the respective category names. The following exhibits in this guide display the **Immunizations** category as a demonstration.

- **Note**: All information in Clinical Viewer is read-only, and users will not be able to print or download any information or documentation. Attempting to save images or data from Clinical Viewer may present security risks, and users must remove any saved data or images from their device after use.

Users can also sort lists in Clinical Viewer using the sorting feature.

To sort a list in Clinical Viewer:
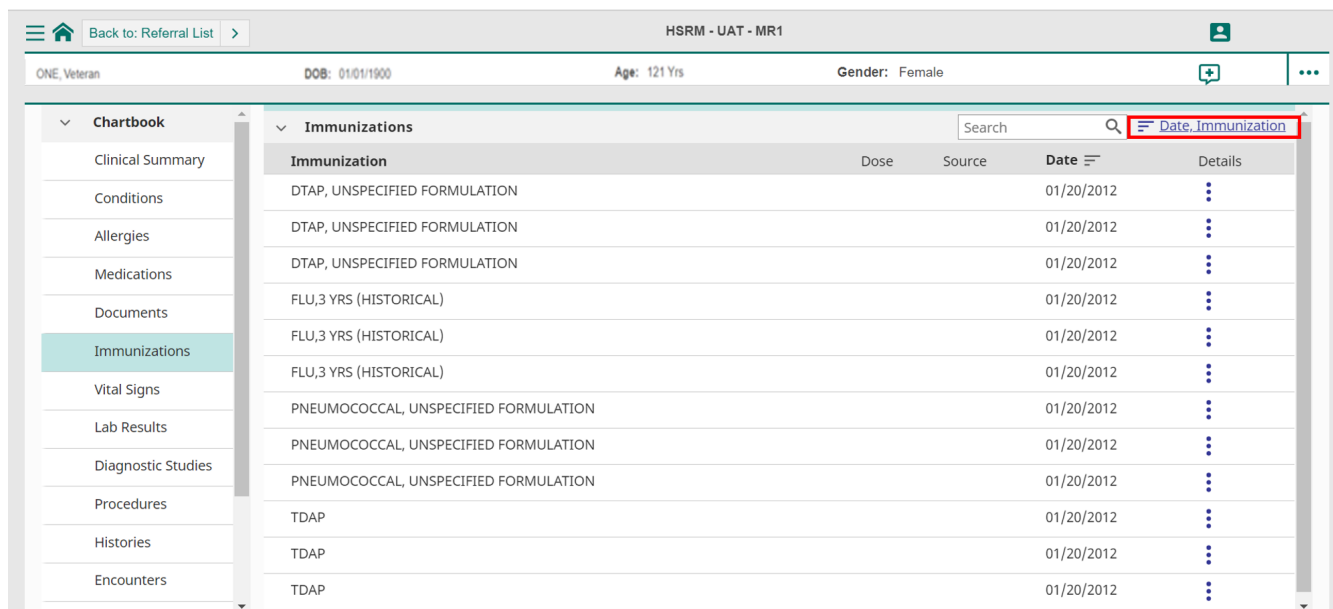
1. Select the **Sorting** icon on the bar at the top of the list, as displayed in **Exhibit 4.**
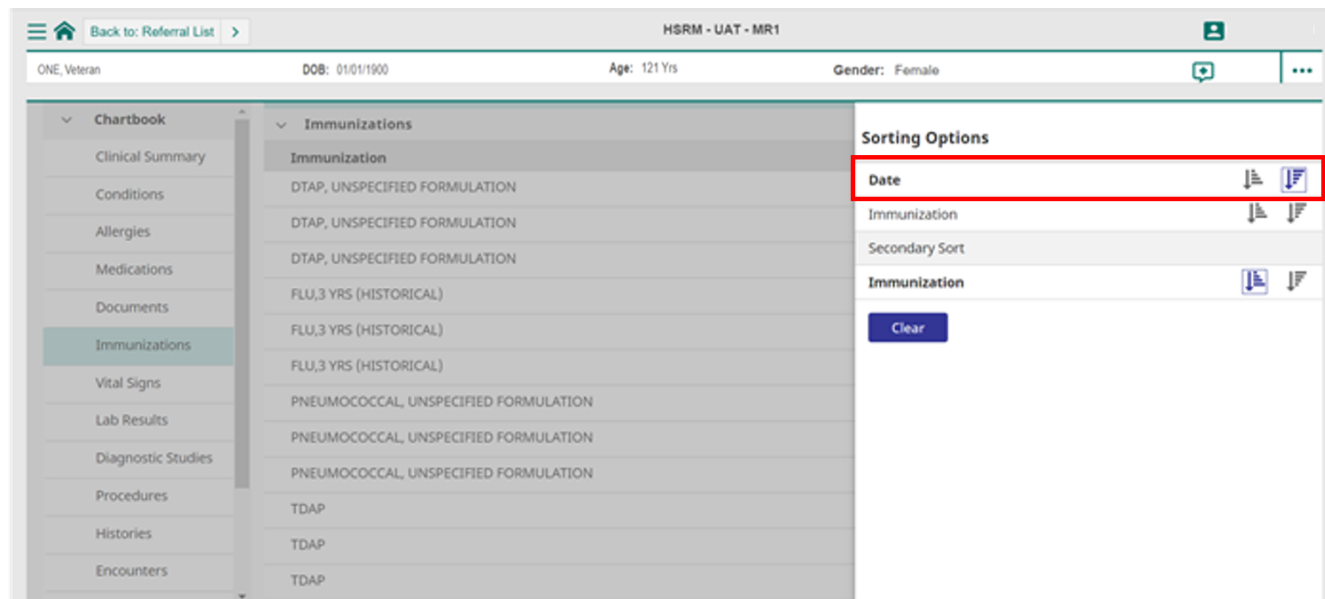
U.S. Department of Veterans Affairs

Veterans Health Administration
Office of Community Care

Exhibit 4: Sorting a List

2. Select the **Ascending** ⬇ or **Descending** ⬇ options to sort the information. These options are displayed in **Exhibit 5**. Users can also use the **Secondary Sort** option to sort the data in each category if multiple sorting options are available.

Exhibit 5: Sorting Options Menu

Users can view specific information about each data entry within a specific Chartbook category. Select the **Details** icon ⋮ on the row for the specific item on the list, as shown in **Exhibit 6.** This allows users to view all available information related to the respective entry, including any available documentation.

Exhibit 6: Immunization Details

4.   HELP WITH HSRM

For assistance using HSRM, Community Providers can contact the HSRM Help Desk to open a ticket by phone at (844) 293-2272 or by email at hsrmsupport@va.gov. VA Staff can contact the Enterprise Service Desk (ESD) for HSRM support through the online self-service feature or by phone at (855) 673-4357. Please have the ticket routed to **HSRM Tier 1 Queue.**